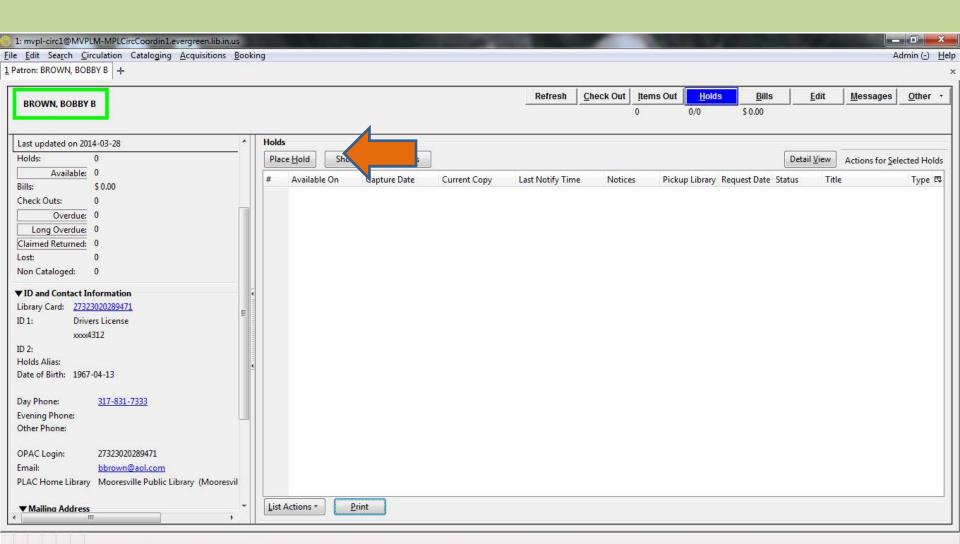


MANAGING HOLDS THROUGH THE PATRON ACCOUNT

Bobby Brown wants to place a hold. He comes to the Circulation Desk for help.









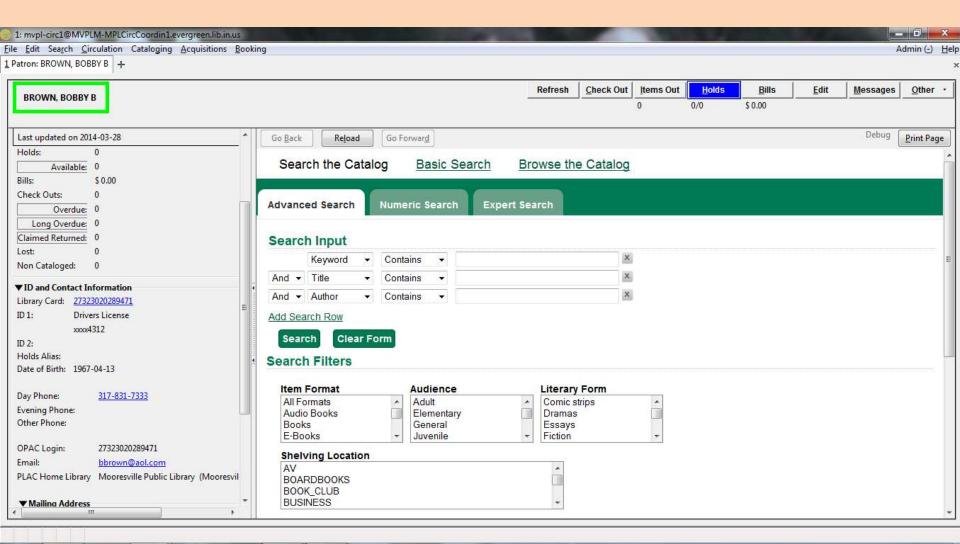








Search for the item he wants.











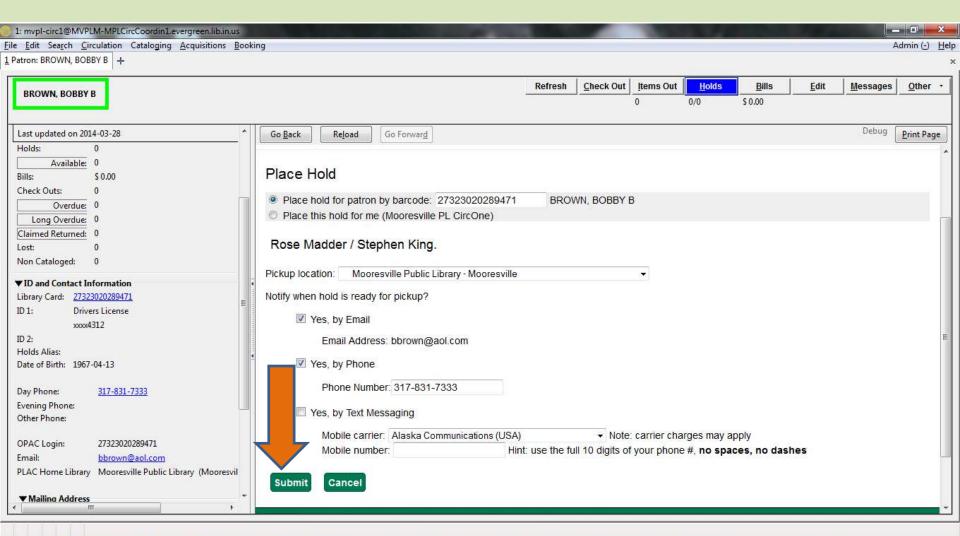








Submit the hold.











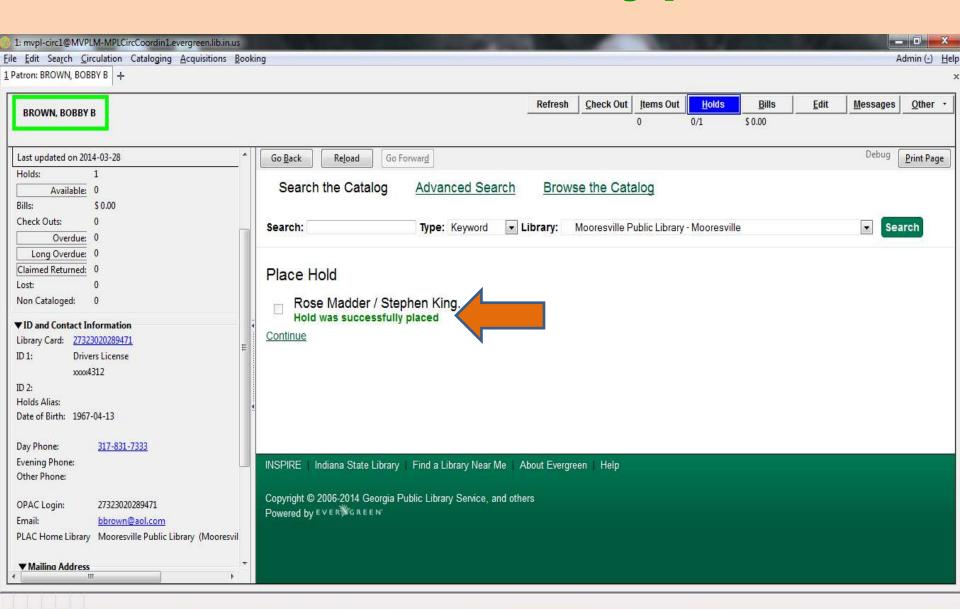








Hold was successfully placed!













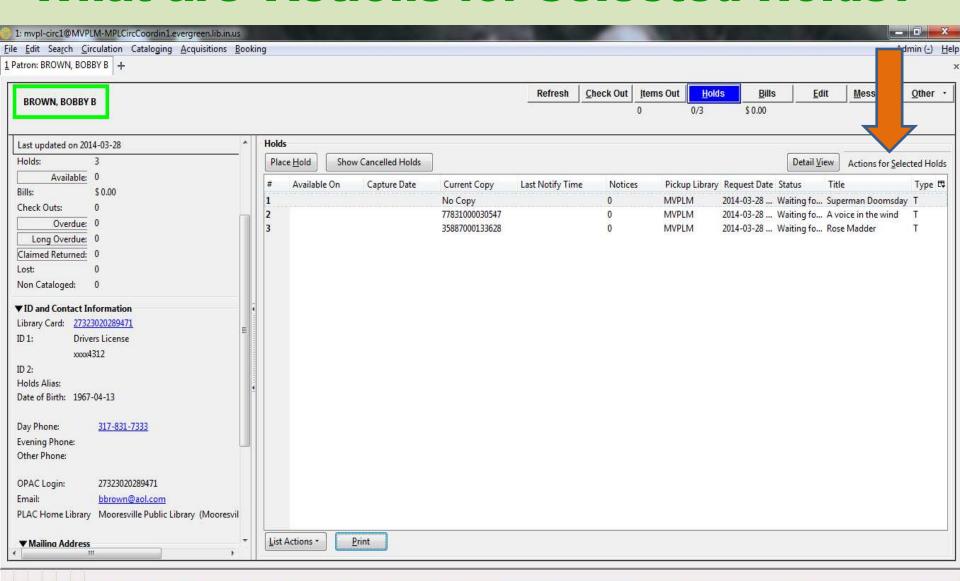








Bobby now has three books on hold. What are 'Actions for Selected Holds?'











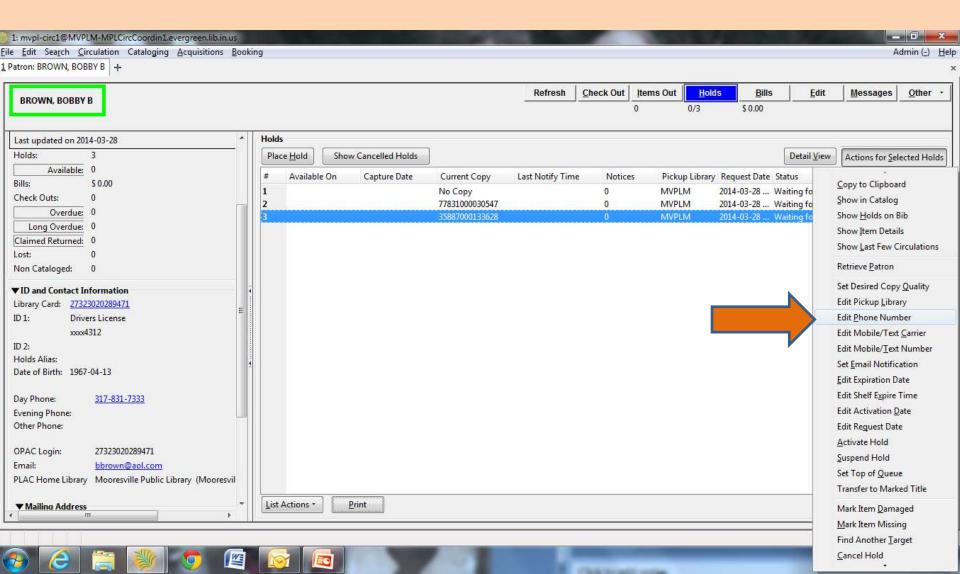




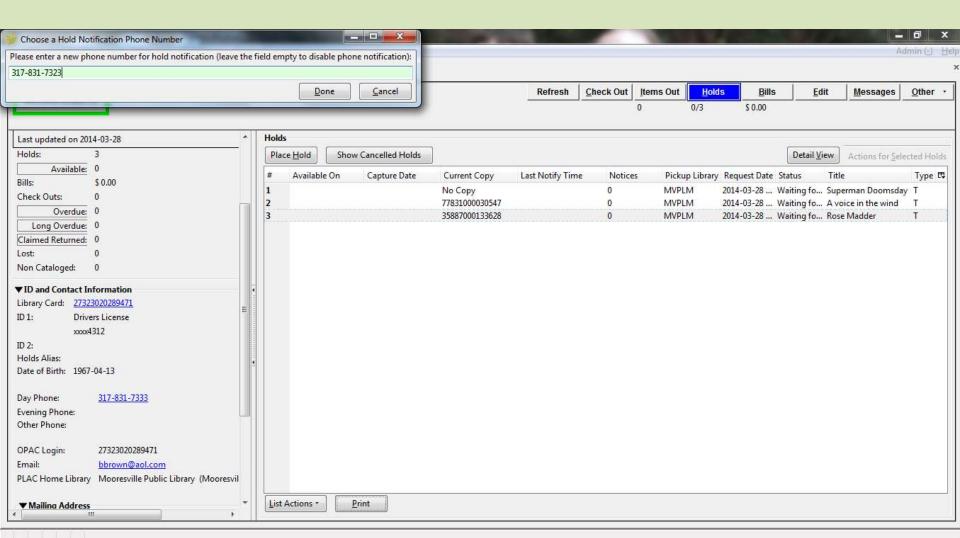




Bobby remembers he has a new phone number. Edit the phone number.



Add the new number to change notification for this hold only.











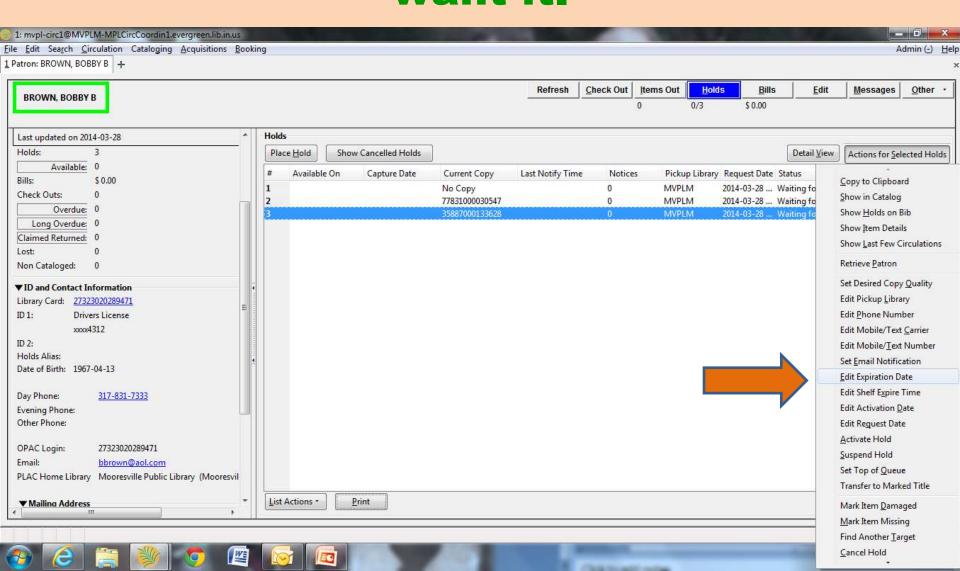




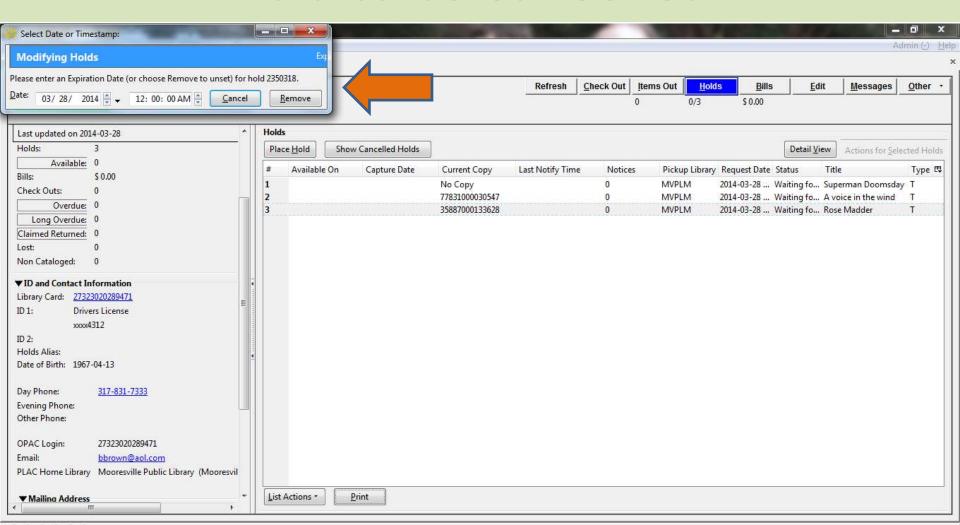




Bobby needs this book for a report. If it is not available in 3 weeks, he doesn't want it.



The expiration date is preset to 9 months. Enter the new date for the hold to be cancelled.











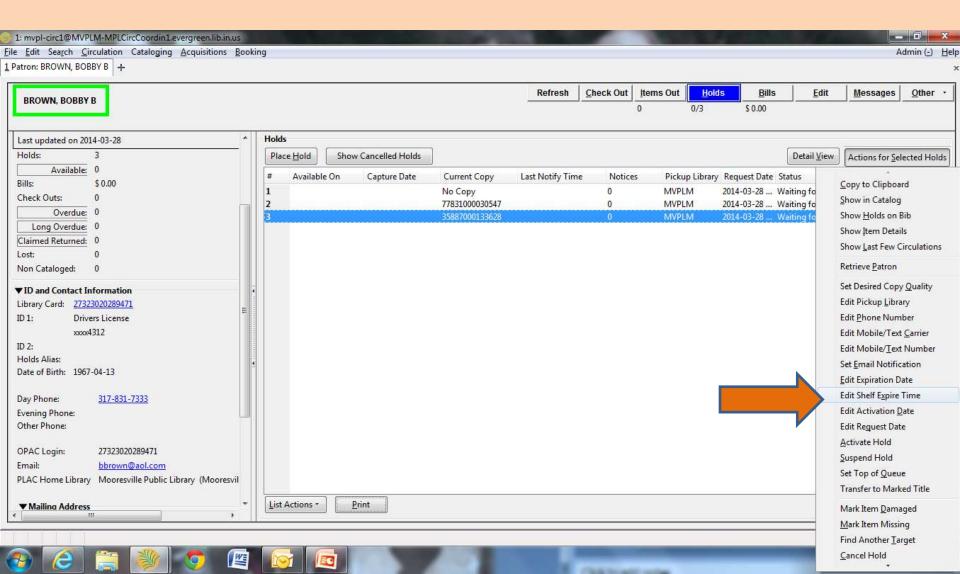




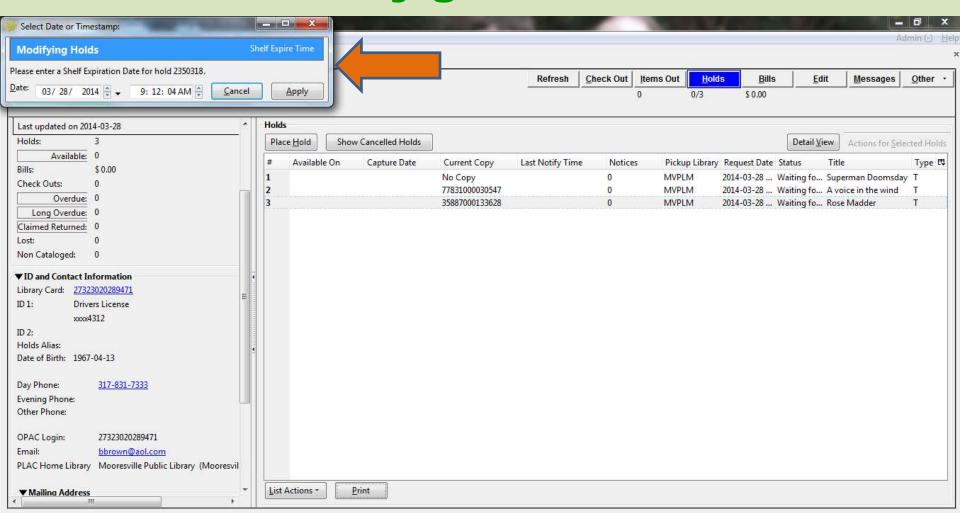




Now the book is here, but Bobby is on vacation. Reset the shelf expire date.



The standard shelf expire date is 7 days. Set the date for 2 days after Bobby gets home.









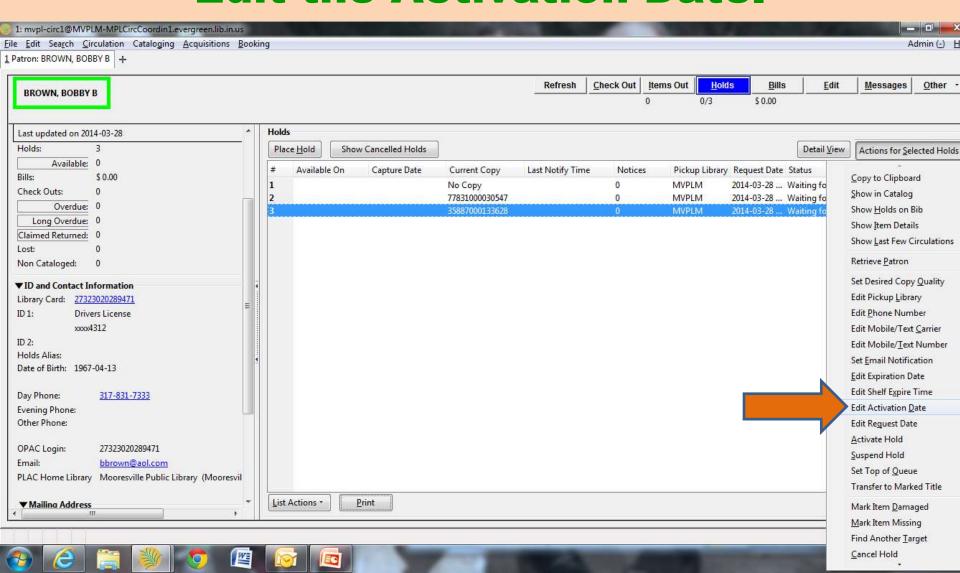




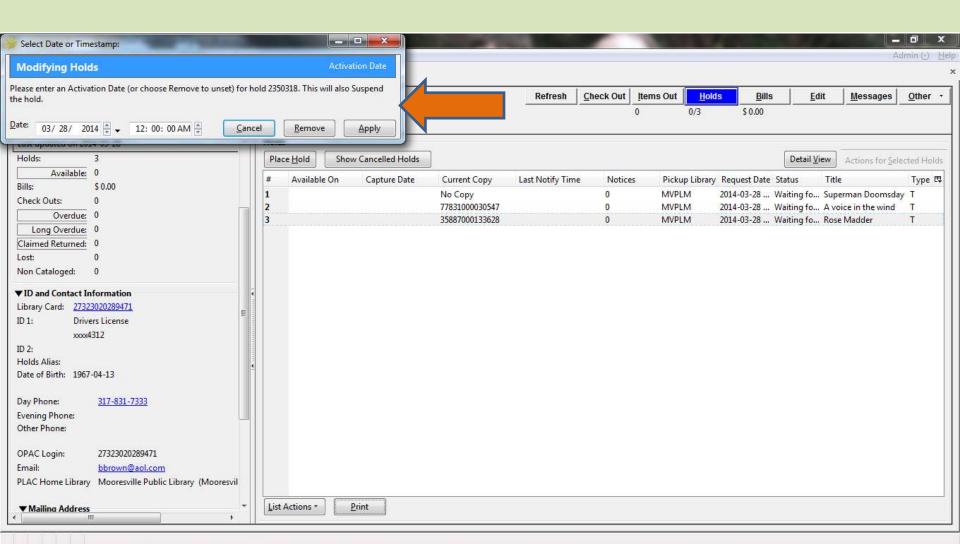




The book has not been trapped when Bobby goes to Europe for 3 months. Edit the Activation Date.



Enter a date near the time Bobby returns from Europe.









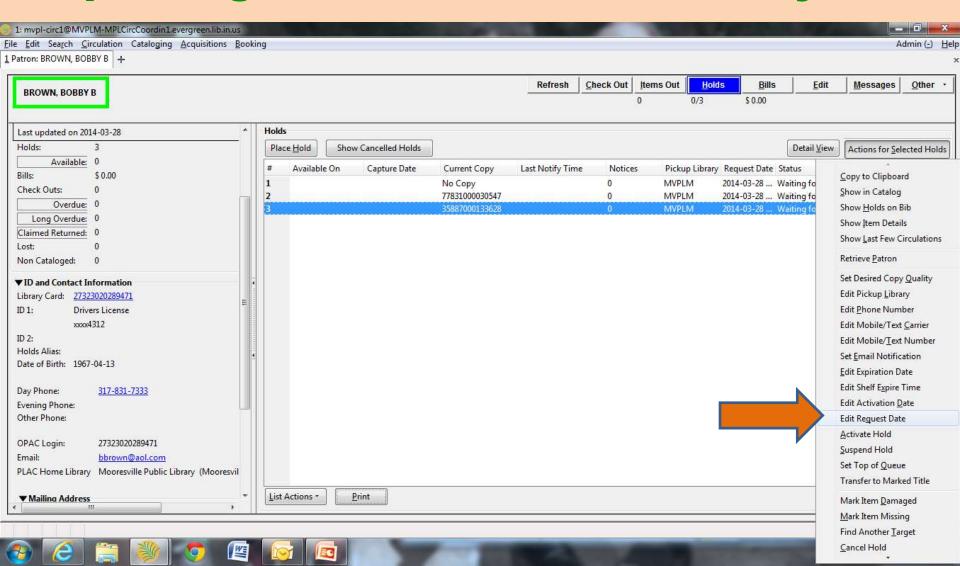






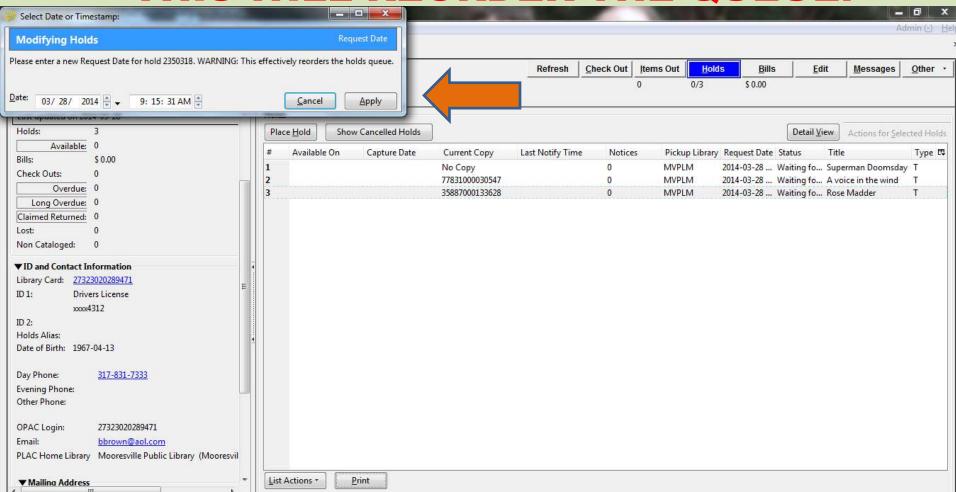


You have been on vacation. When you return, you find an email from Bobby requesting a hold. The email is 6 days old.



You place the hold today, but may edit the request date to match the day the item was requested.

THIS WILL REORDER THE QUEUE!









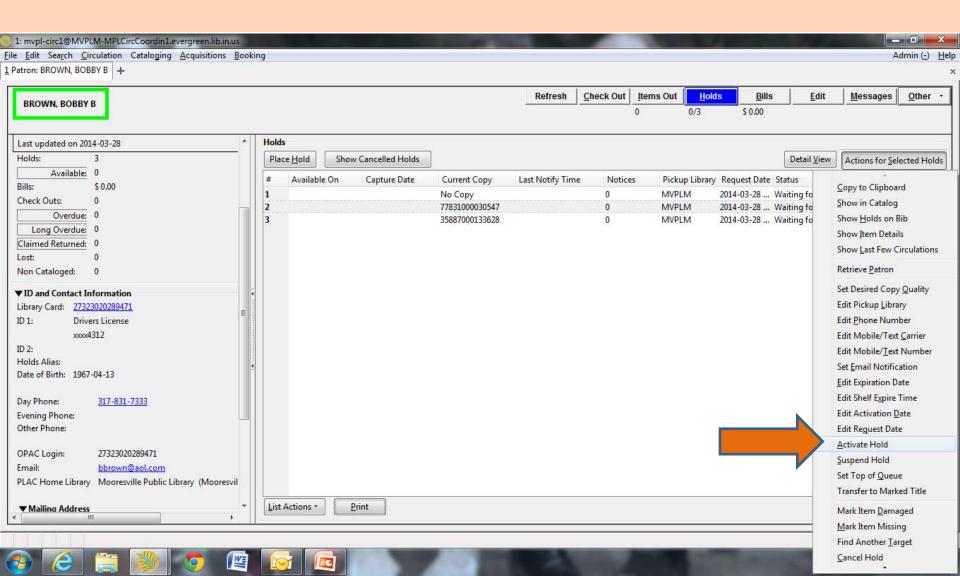




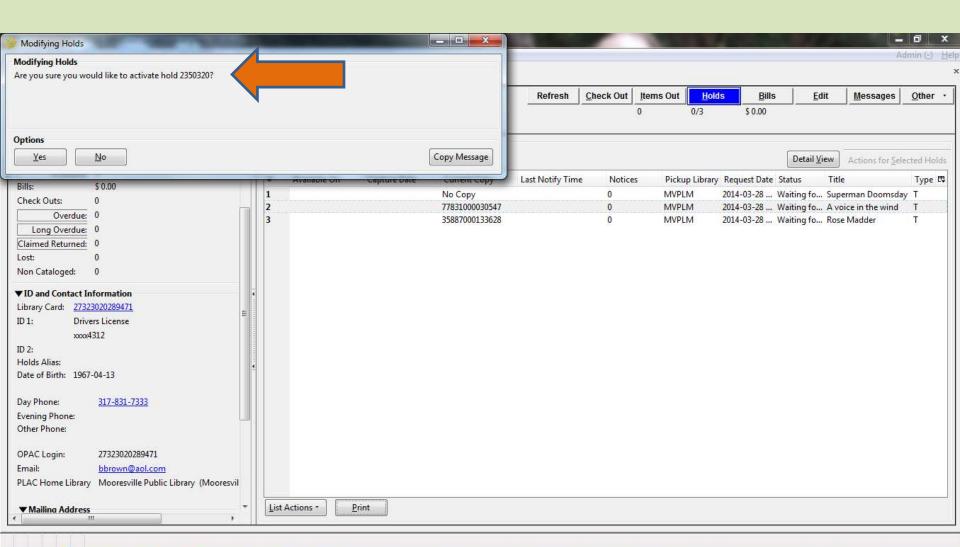




Bobby can only afford one month in Europe. He is home now.



Activate the hold so Bobby will reappear on the hold list for this item.











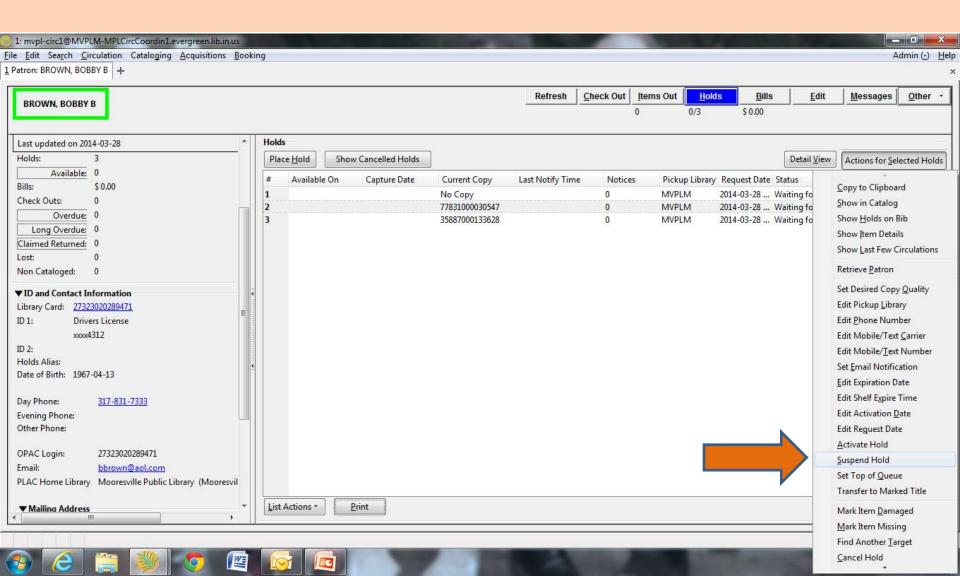




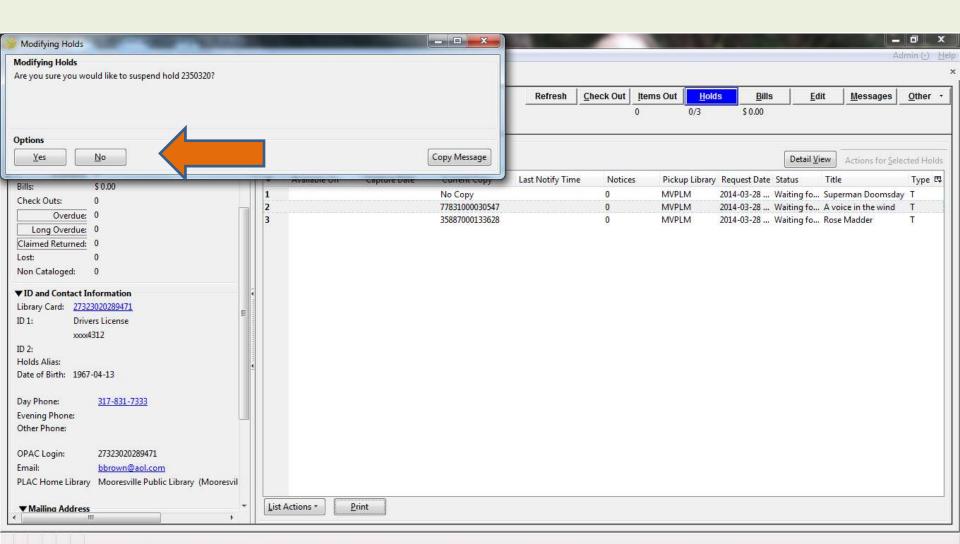




Bobby's mother is ill. He will be out of state for 3 weeks. Suspend the hold.



Suspend the hold until Bobby calls to say he is home again.









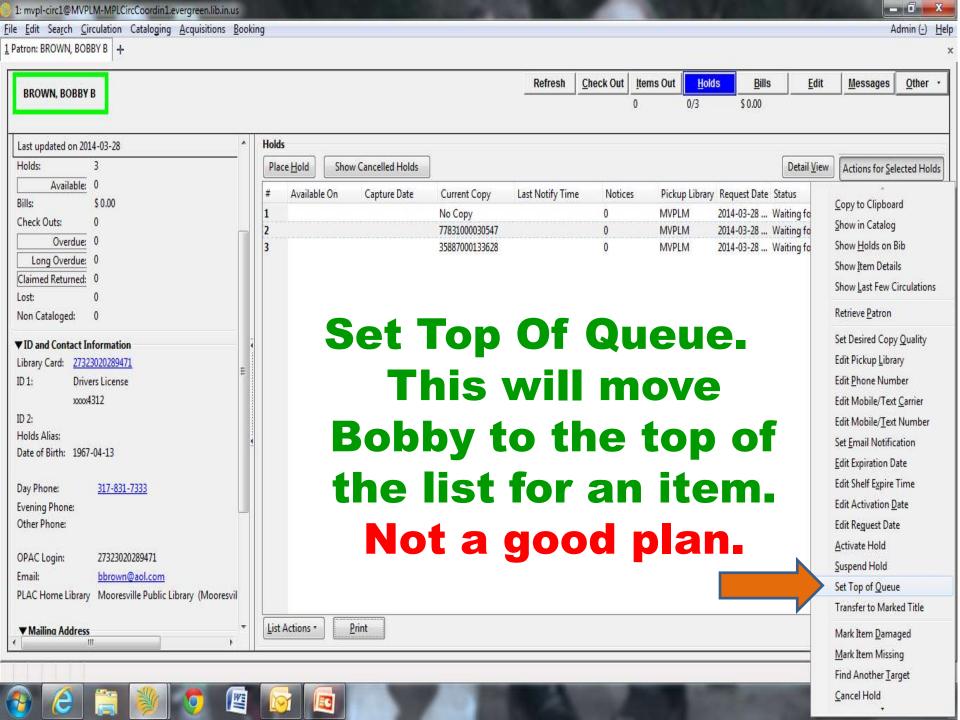




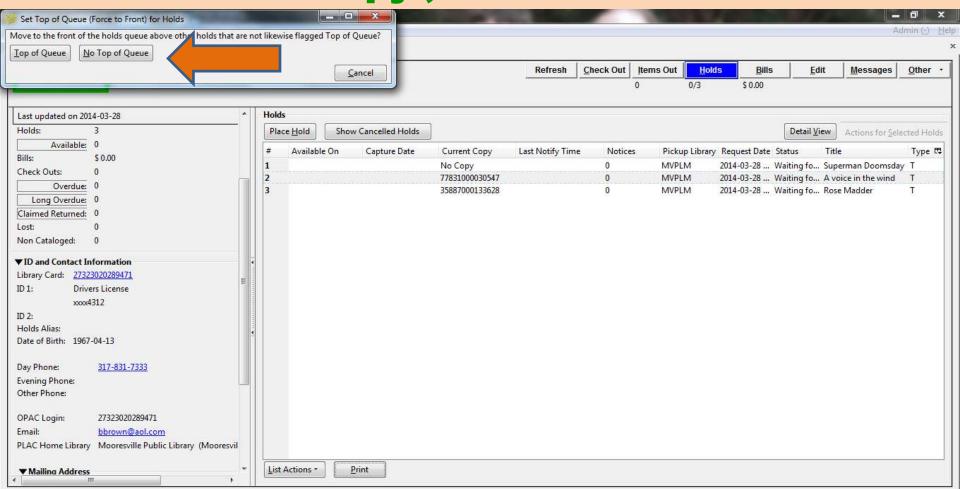








I can only see using this when an item is damaged and needs to be removed from circulation. Be sure the hold is set to 'Copy', not 'Title.'









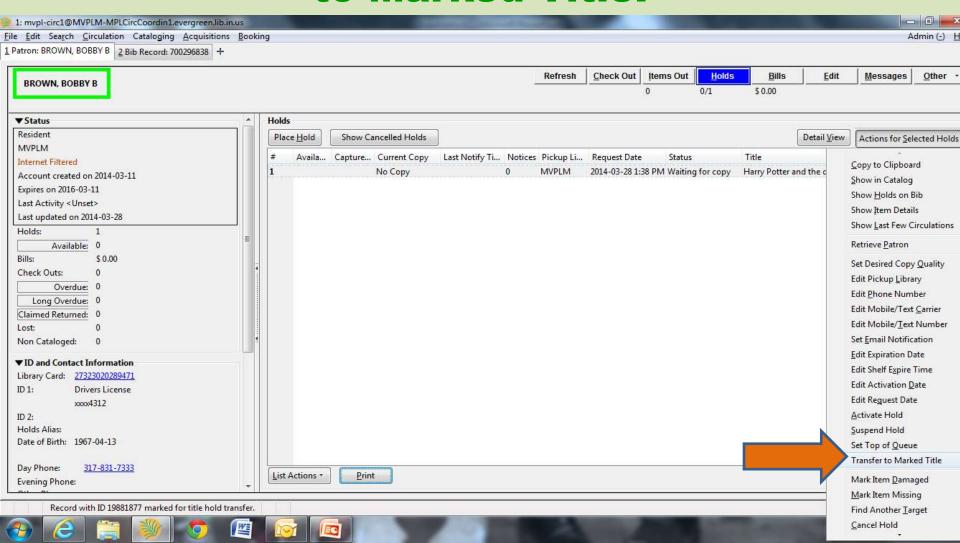




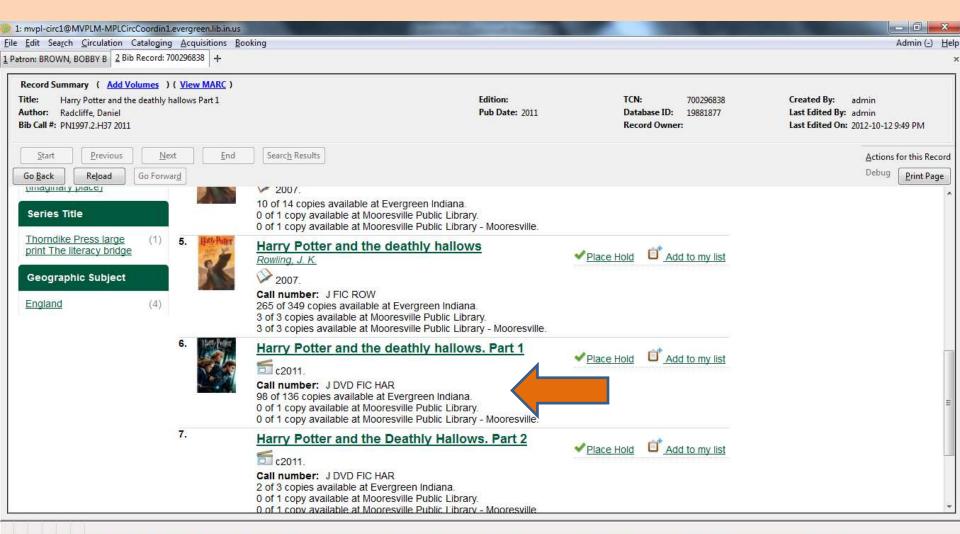




Bobby has placed his own hold this time, but on the wrong item. This hold is for the book but he really wants the DVD. Transfer to Marked Title.



Find the correct item in the catalog.













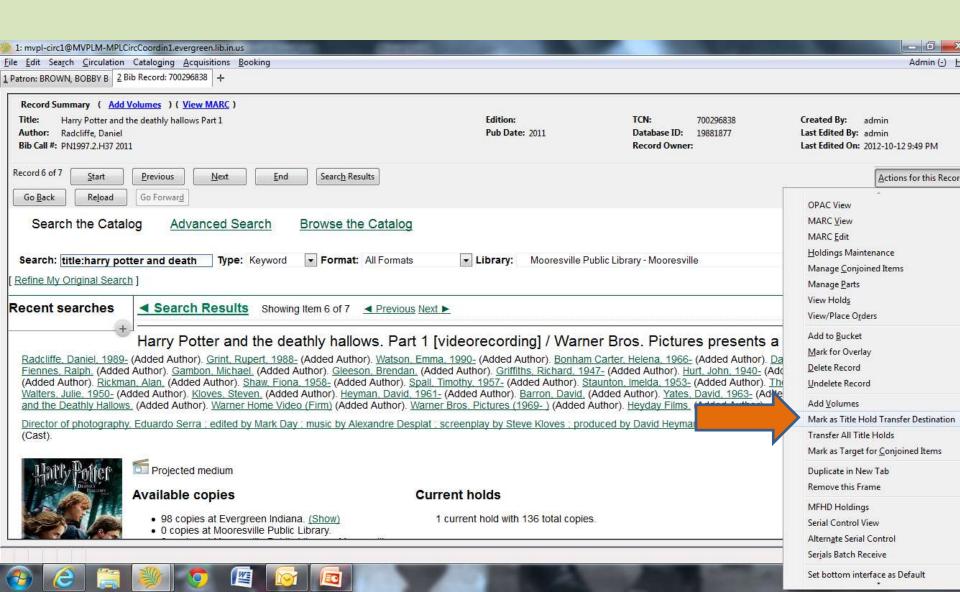




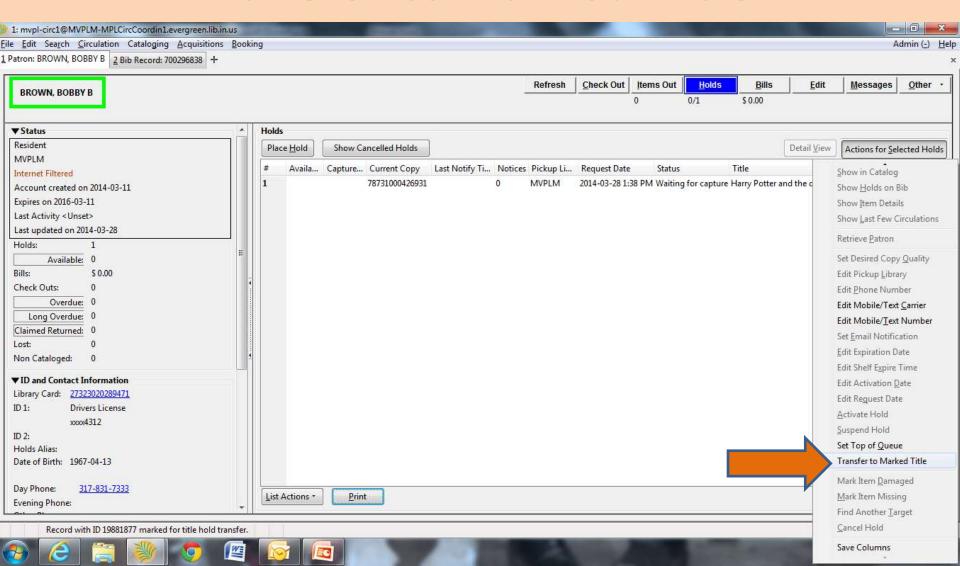




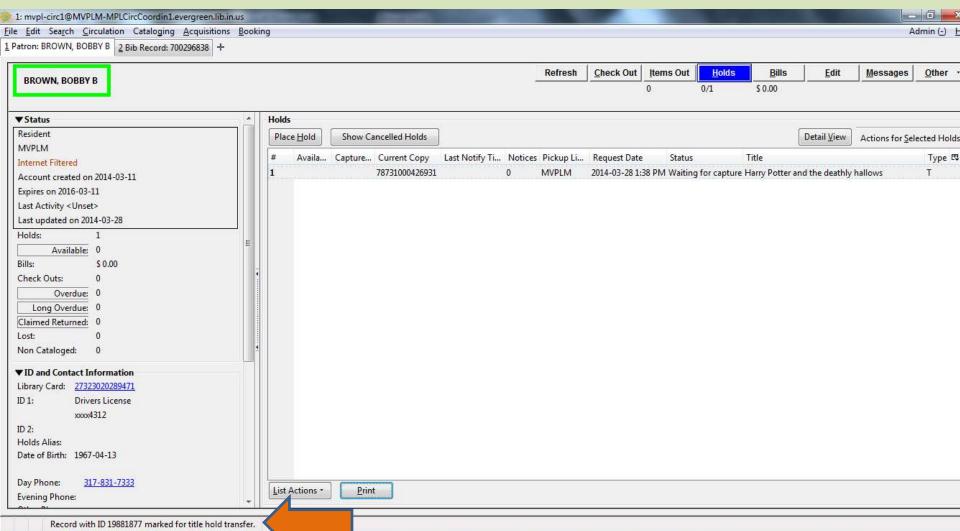
Mark as Title Hold Transfer Destination.



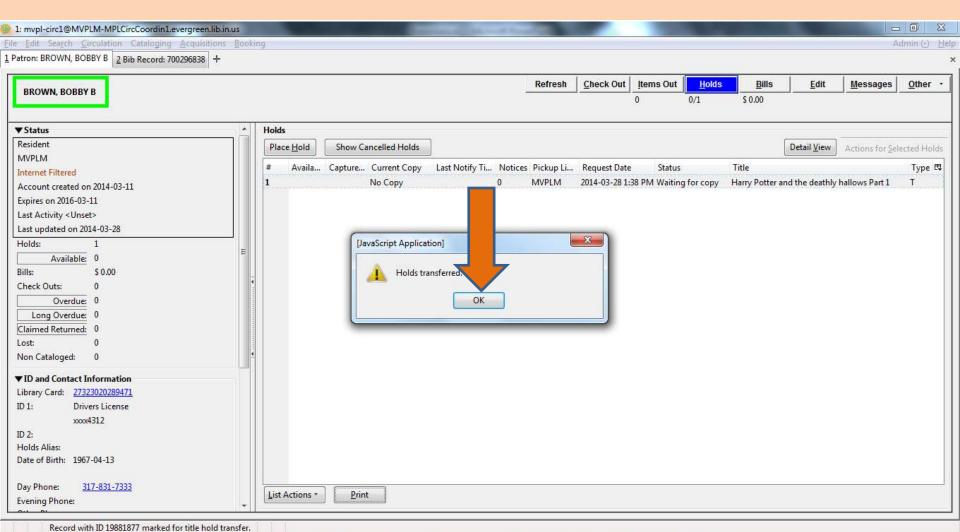
Open Bobby's account Holds screen. Choose the incorrect hold, then Transfer to Marked Title.



Note the message on the bottom of the screen. This is the item you marked to replace the incorrect hold.



Bobby is now waiting for the DVD instead of the book.













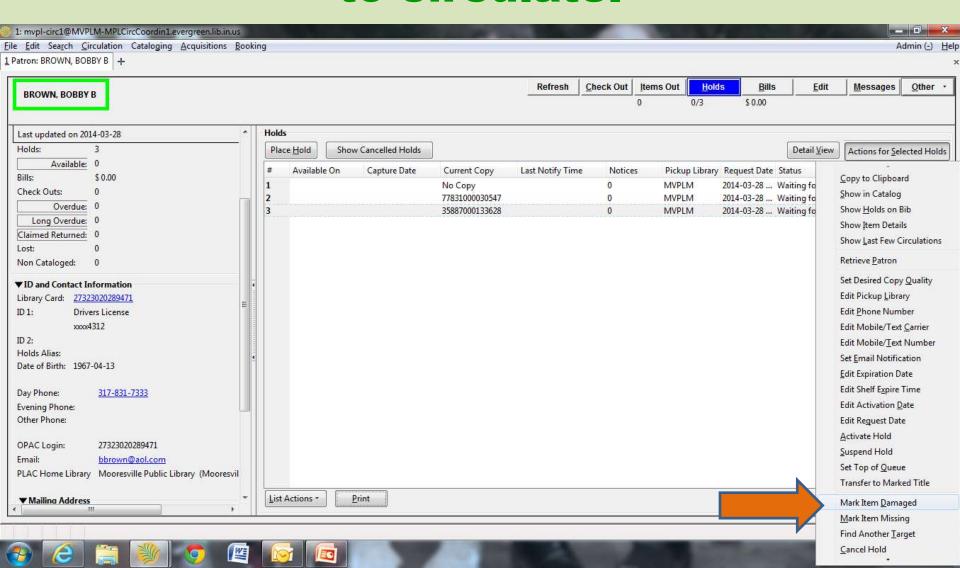




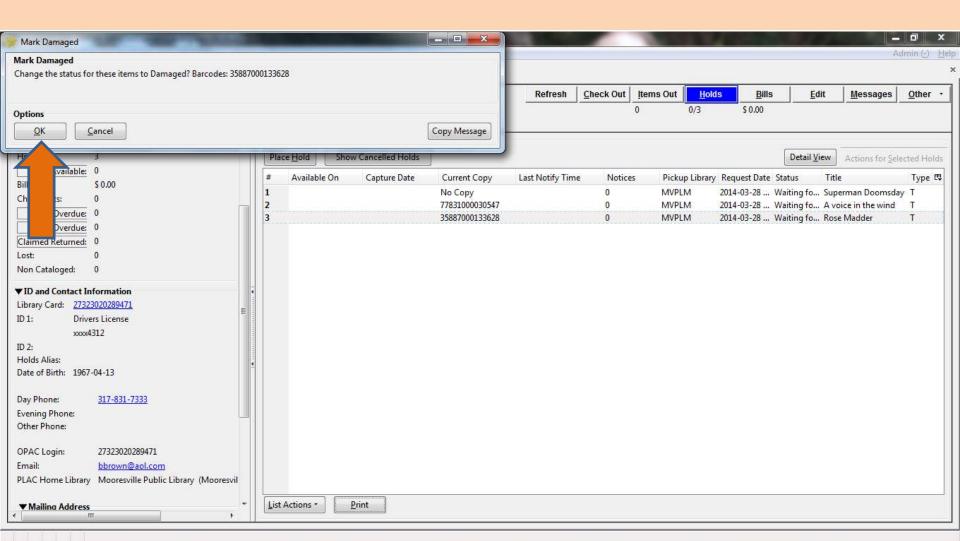




Mark Item Damaged. The item was found on the shelf but is too damaged to circulate.



Changing the status will retarget the hold to another copy.











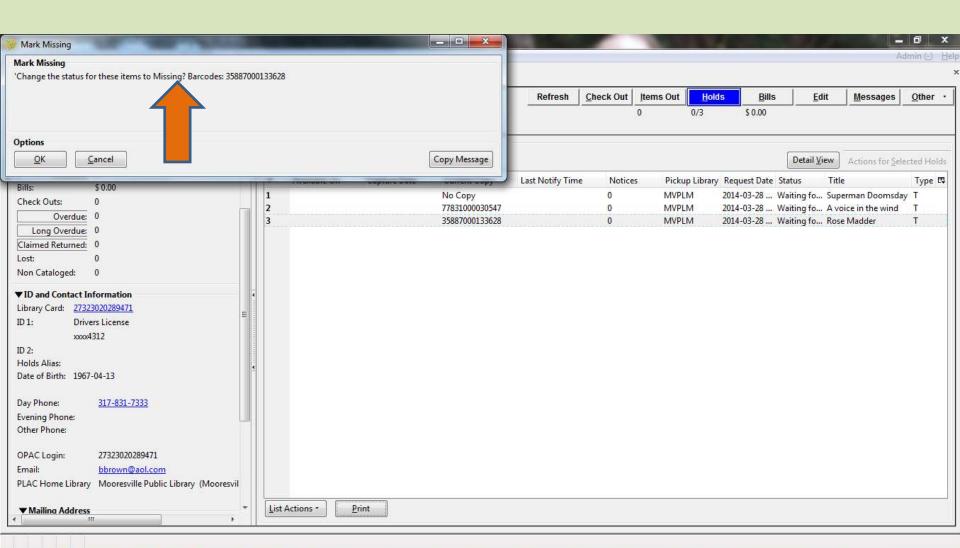








Mark Missing. Changing the status will retarget the hold.











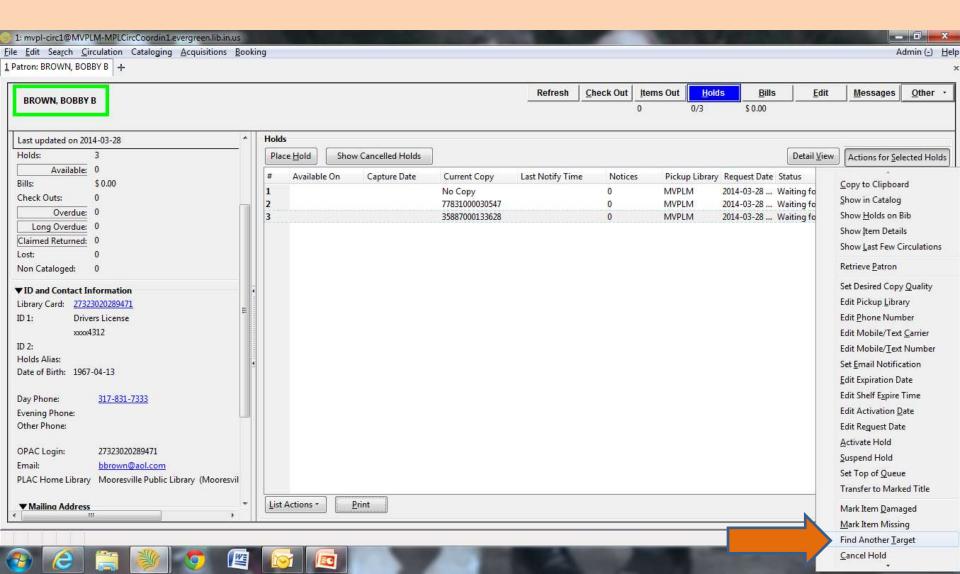




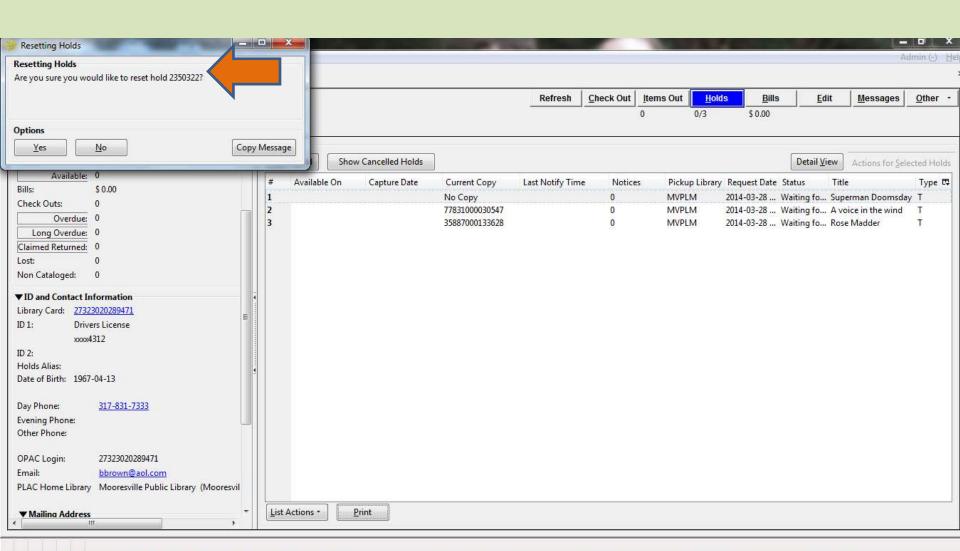




Find another target. My copy can't be found after searching a couple of days.



Resetting the hold will find the next available copy.











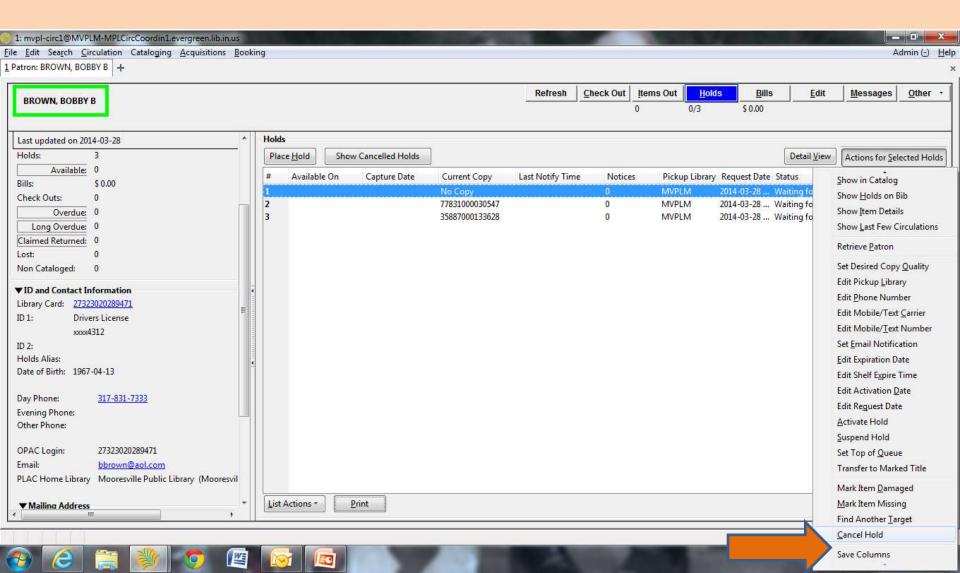




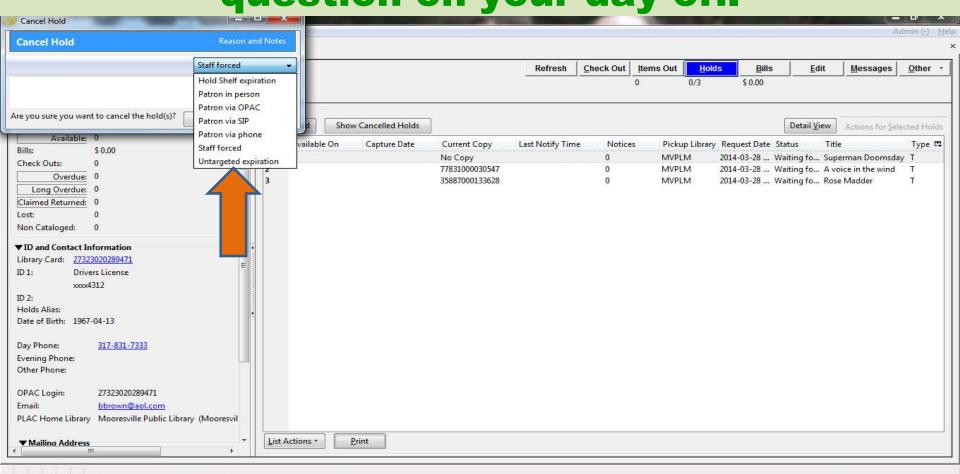




Cancel Hold. Bobby is tired of waiting and bought his own copy of this book.



There are several reasons to cancel a hold. Choose the best option for each situation, and leave notes in the field provided. Notes are a great help if Bobby comes with a question on your day off.









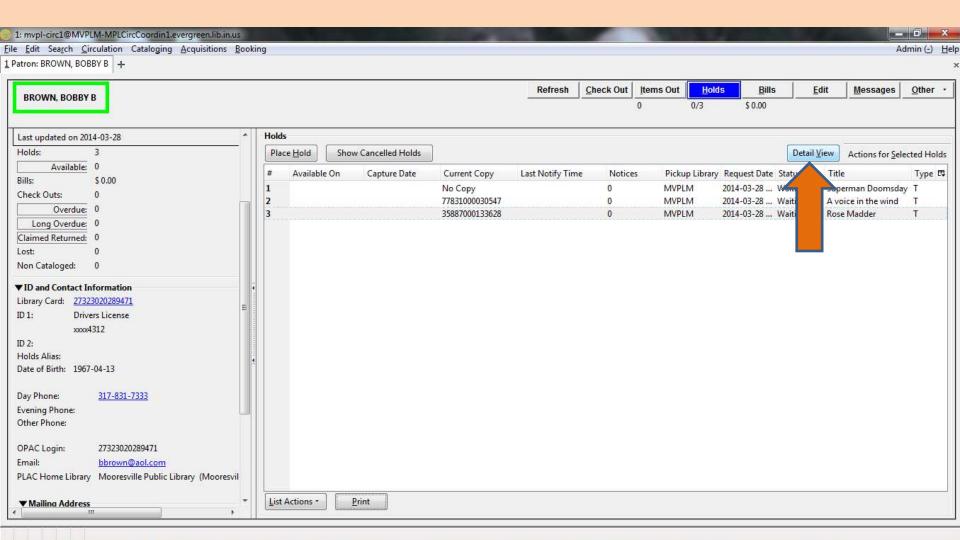








This screen is set at 'List View,' the default setting.











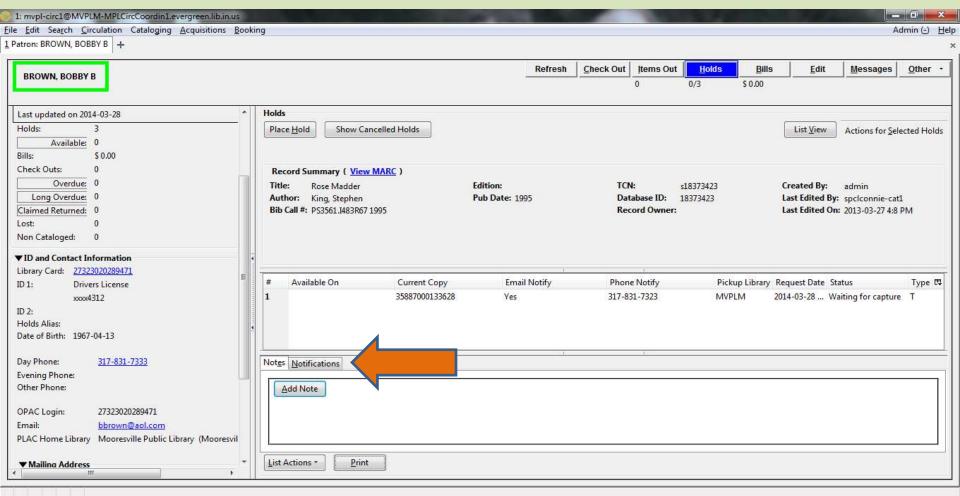








This screen is set for Detail View. You may check to see when and if notifications have gone out to Bobby. You may also add a note if you call Bobby personally.



















Managing Holds in Evergreen

It's easy. Just follow the links from the patron account, and you, too will be able to manage any hold like a pro.

Virginia Jensen virginiaj@mooresville.lib.in.us 317-831-7323